

## View Bills History

### Open the Report

1. Click the User Status Wizard. Scan, paste, or type a user ID in the Enter User ID or Name field. If you do not have the patron ID to scan, click Find User to display the Identify User window.

The screenshot shows the SirsiDynix Reports window. On the left is a navigation menu with options: Check Out, Check In, User Status (selected), Item Status, Holds, and Maintain Users. The main area has a header with 'Enter a User ID or Name' and a text input field containing '000186034'. To the right of the input field is a 'Find User' button. Below the input field is a 'Clear' button. At the top right of the window are buttons for 'Print', 'Help', 'About', and 'Disconnect'. The SirsiDynix logo is in the bottom left corner.

2. Use the vertical scroll bar to navigate to the Bills section of the user record. Click the Bills History button.

The screenshot shows the SirsiDynix Reports window with the 'User Status' section selected. The user information is displayed as follows:

User Name	SMITH, ANDREW	User cat1	09
User ID	000188623	Group ID	HR COOPER
Profile	HIGHSCHOOL	Library	HARMON
Status	DELINQUENT	Note	this is a test
Checkouts	9	Overdue	9
Holds	2	Amount Owed	\$20.30

Below the user information is a table of holds:

Hold #	Title	Author	Date Due	Status	Library	Barcode
1	The absolutely perfect	Dunn, Marylois, 1	1/15/2010	NEVER	HARMON	Available
1	The valley of horses	Auel, Jean M.	1/15/2010	NEVER	HARMON	Unavailable

Below the holds table is the 'Bills' section:

Date	Title	Item ID	Reason	Amount
1/14/2010	Scary stories 3 : more tales to chill your	25000007575070	OVERDUE	\$3.00

At the bottom of the Bills section are buttons: 'Bills History', 'New Bill', 'Pay Bill', and 'Pay Total Bills'. Below these are 'Clear' and 'Return to Search' buttons. The SirsiDynix logo is in the bottom left corner.

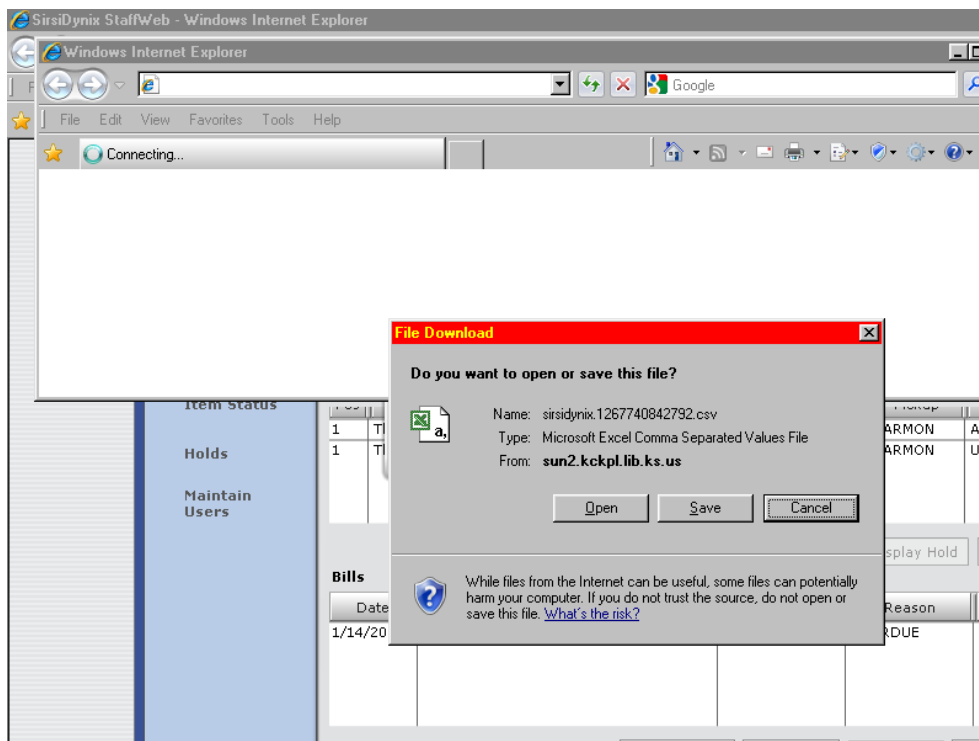
## View Bills History

3. The Bill History box appears. Click on the Download(CSV) button.

The screenshot shows the SirsiDynix StaffWeb interface. On the left is a navigation menu with options: Check Out, Check In, User Status (selected), Item Status, Holds, and Maintain Users. The main area displays user information for SMITH, ANDREW (User ID: 000188623, Profile: HIGH SCHOOL, Status: DELINQUENT). A 'Bill History' modal box is open, containing buttons for Display(HTML), Download(CSV), Cancel, and Help. Below the modal, there is a table of bills with columns: Date, Title, Item ID, Reason, and Amount. The table shows one bill dated 1/14/2010 for 'Scary stories 3 : more tales to chill your I' with item ID 25000007575070, reason OVERDUE, and amount \$3.00. At the bottom of the interface are buttons for Bills History, New Bill, Pay Bill, Pay Total Bills, Clear, and Return to Search.

Date	Title	Item ID	Reason	Amount
1/14/2010	Scary stories 3 : more tales to chill your I	25000007575070	OVERDUE	\$3.00

4. Microsoft Excel is launched. Click the Open button to view the report.



## View Bills History

## Format the Report

1. Below is a view of the finished report in Excel before formatting.

	A	B	C	D	E	F	G	H	I	J	K	L
	title	itemid	reason	amount	bill	balance	date	library	(payment rtype	date	amount ...	repeats)
1	Sharks / c	2.5E+13	LOST	14.43	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	14.43	
2	Sharks / c	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
3	Gerbils. W	2.5E+13	LOST	3.75	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	3.75	
4	Gerbils. W	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
5	Free at las	2.5E+13	LOST	7.55	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	7.55	
6	Free at las	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
7	Human bo	2.5E+13	OVERDUE	0.5	0	11/10/06	ROSEDAL	1	CANCEL	11/28/06	0.05	
8	September	2.5E+13	OVERDUE	0.5	0	11/10/06	ROSEDAL	1	CASH	11/28/06	0.5	
9	September	2.5E+13	OVERDUE	0.05	0	11/28/06	ROSEDAL	1	CASH	11/28/06	0.05	
10	The Night	2.5E+13	OVERDUE	0.5	0	2/2/07	ROSEDAL	1	CASH	4/24/08	0.5	
11	Classic ra	2.5E+13	OVERDUE	0.5	0	2/2/07	ROSEDAL	1	CASH	4/24/08	0.5	
12	The terrori	2.5E+13	OVERDUE	0.5	0	4/27/07	ROSEDAL	1	CASH	4/24/08	0.5	
13	Human bo	2.5E+13	OVERDUE	0.5	0	4/27/07	ROSEDAL	1	CASH	4/24/08	0.5	
14	Guinness	2.5E+13	OVERDUE	0.25	0	5/11/07	ROSEDAL	1	CASH	4/24/08	0.25	
15	A light in t	2.5E+13	OVERDUE	0.25	0	5/11/07	ROSEDAL	1	CASH	4/24/08	0.25	
16	Draw 50 bu	2.5E+13	LOST	13.99	0	11/19/07	ROSEDAL	1	CANCEL	4/24/08	13.99	
17	Draw 50 bu	2.5E+13	PROCESS	5	0	11/19/07	ROSEDAL	1	CANCEL	4/24/08	5	
18	Draw 50 bu	2.5E+13	OVERDUE	3	0	4/24/08	ROSEDAL	1	CASH	4/24/08	3	
19	Scary stor	2.5E+13	LOST	10.86	0	10/27/08	ROSEDAL	1	CANCEL	1/14/10	10.86	
20	Scary stor	2.5E+13	PROCESS	5	0	10/27/08	ROSEDAL	1	CANCEL	1/14/10	5	
21	Scary stor	2.5E+13	OVERDUE	3	3	1/14/10	ROSEDALE					
22												
23												

2. To format the "itemid" column, right click on the column heading and select Format Cells from the pop-up menu. Select Number as a format, lower the Decimal places field to zero (0) and click OK..

	A	B	C	D	E	F	G	H	I	J	K	L
	title	itemid	reason	amount	bill	balance	date	library	(payment rtype	date	amount ...	repeats)
1	Sharks / c	2.5E+13	LOST	14.43	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	14.43	
2	Sharks / c	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
3	Gerbils. W	2.5E+13	LOST	3.75	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	3.75	
4	Gerbils. W	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
5	Free at las	2.5E+13	LOST	7.55	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	7.55	
6	Free at las	2.5E+13	PROCESS	5	0	12/6/04	FRUSHTO	1	CANCEL	12/14/04	5	
7	Human bo	2.5E+13	OVERDUE	0.5	0	11/10/06	ROSEDAL	1	CANCEL	11/28/06	0.05	
8	September	2.5E+13	OVERDUE	0.5	0	11/10/06	ROSEDAL	1	CASH	11/28/06	0.5	
9	September	2.5E+13	OVERDUE	0.05	0	11/28/06	ROSEDAL	1	CASH	11/28/06	0.05	
10	The Night	2.5E+13	OVERDUE	0.5	0	2/2/07	ROSEDAL	1	CASH	4/24/08	0.5	
11	Classic ra	2.5E+13	OVERDUE	0.5	0	2/2/07	ROSEDAL	1	CASH	4/24/08	0.5	
12	The terrori	2.5E+13	OVERDUE	0.5	0	4/27/07	ROSEDAL	1	CASH	4/24/08	0.5	
13	Human bo	2.5E+13	OVERDUE	0.5	0	4/27/07	ROSEDAL	1	CASH	4/24/08	0.5	
14	Guinness	2.5E+13	OVERDUE	0.25	0	5/11/07	ROSEDAL	1	CASH	4/24/08	0.25	
15	A light in t	2.5E+13	OVERDUE	0.25	0	5/11/07	ROSEDAL	1	CASH	4/24/08	0.25	
16	Draw 50 bu	2.5E+13	LOST	13.99	0	11/19/07	ROSEDAL	1	CANCEL	4/24/08	13.99	
17	Draw 50 bu	2.5E+13	PROCESS	5	0	11/19/07	ROSEDAL	1	CANCEL	4/24/08	5	
18	Draw 50 bu	2.5E+13	OVERDUE	3	0	4/24/08	ROSEDAL	1	CASH	4/24/08	3	
19	Scary stor	2.5E+13	LOST	10.86	0	10/27/08	ROSEDAL	1	CANCEL	1/14/10	10.86	
20	Scary stor	2.5E+13	PROCESS	5	0	10/27/08	ROSEDAL	1	CANCEL	1/14/10	5	
21	Scary stor	2.5E+13	OVERDUE	3	3	1/14/10	ROSEDALE					
22												
23												
24												

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3. To format the "amountbilled" and "balance" columns, right click on the column headings and select Format Cells from the pop-up menu. Select Currency as a format and click OK..

The screenshot shows the 'Format Cells' dialog box in Microsoft Excel. The 'Number' tab is selected, and 'Currency' is chosen from the 'Category' list. The 'Sample' shows 'amountbilled' formatted as currency. The 'Decimal places' are set to 2, and the 'Symbol' is '\$'. The 'Negative numbers' section shows options like '-\$1,234.10' and '(\$1,234.10)'. The background spreadsheet shows columns A through L with data for items like 'Sharks / c', 'Gerbils. Wv', and 'Free at las'.

A	B	C	D	E	F	G	H	I	J	K	L
1	title	itemid	reason	amountbilled	balance	date	library	(payment rtype	date	amount ... repeats)	
2	Sharks / c	25000005416640	LOST	14.43	0	1					
3	Sharks / c	25000005416640	PROCESS	5	0	1					
4	Gerbils. Wv	25000002174853	LOST	3.75	0	1					
5	Gerbils. Wv	25000002174853	PROCESS	5	0	1					
6	Free at las	25000005750535	LOST	7.55	0	1					
7	Free at las	25000005750535	PROCESS	5	0	1					
8	Human boi	25000006149117	OVERDUE	0.5	0	11					
9	September	25000003309789	OVERDUE	0.5	0	11					
10	September	25000003309789	OVERDUE	0.05	0	11					
11	The Night	25000000179789	OVERDUE	0.5	0						
12	Classic rat	25000005537718	OVERDUE	0.5	0						
13	The terrori	25000006059506	OVERDUE	0.5	0	4					
14	Human boi	25000006149117	OVERDUE	0.5	0	4					
15	Guinness	25000006390414	OVERDUE	0.25	0	5					
16	A light in tl	25000001603258	OVERDUE	0.25	0	5					
17	Draw 50 bi	25000005721650	LOST	13.99	0	11					
18	Draw 50 bi	25000005721650	PROCESS	5	0	11					
19	Draw 50 bi	25000005721650	OVERDUE	3	0	4					
20	Scary stor	25000007575070	LOST	10.86	0	10					
21	Scary stor	25000007575070	PROCESS	5	0	10					
22	Scary stor	25000007575070	OVERDUE	3	3	1					

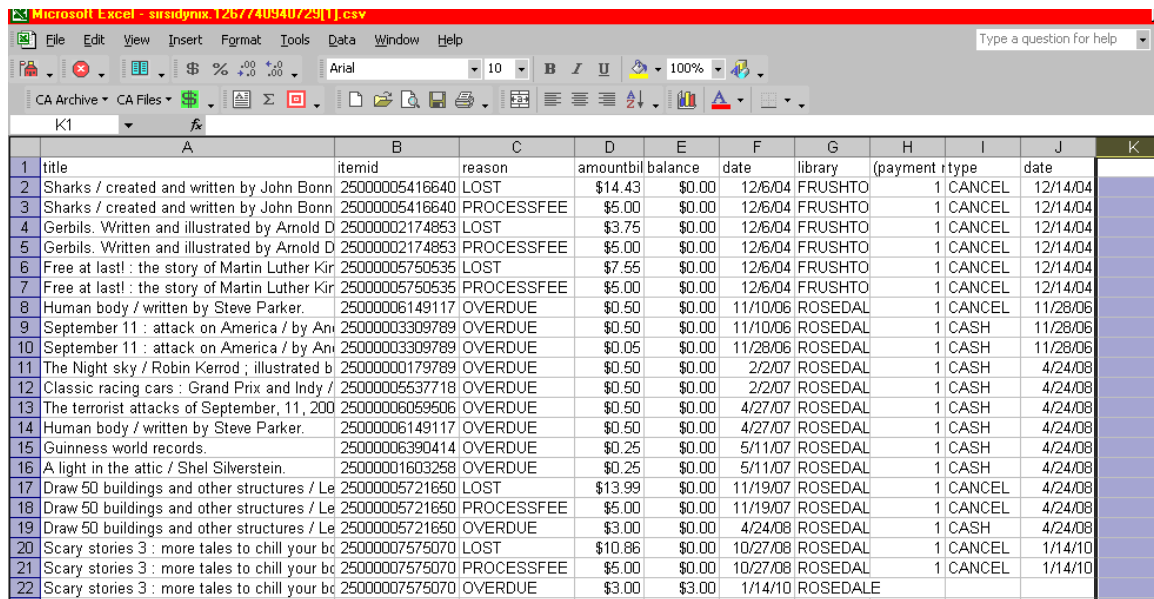
4. The "amount repeats" column is redundant, and can be removed by right clicking on the column heading and selecting Delete from the pop-up menu.

The screenshot shows the spreadsheet after the 'amount ... repeats' column has been removed. The columns are now A through J, and the data is formatted with currency for the 'amountbilled' and 'balance' columns.

A	B	C	D	E	F	G	H	I	J
1	title	itemid	reason	amountbilled	balance	date	library	(payment rtype	date
2	Sharks / c	25000005416640	LOST	\$14.43	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
3	Sharks / c	25000005416640	PROCESS	\$5.00	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
4	Gerbils. Wv	25000002174853	LOST	\$3.75	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
5	Gerbils. Wv	25000002174853	PROCESS	\$5.00	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
6	Free at las	25000005750535	LOST	\$7.55	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
7	Free at las	25000005750535	PROCESS	\$5.00	\$0.00	12/6/04	FRUSHTO	1 CANCEL	12/14/04
8	Human boi	25000006149117	OVERDUE	\$0.50	\$0.00	11/10/06	ROSEDAL	1 CANCEL	11/28/06
9	September	25000003309789	OVERDUE	\$0.50	\$0.00	11/10/06	ROSEDAL	1 CASH	11/28/06
10	September	25000003309789	OVERDUE	\$0.05	\$0.00	11/28/06	ROSEDAL	1 CASH	11/28/06
11	The Night	25000000179789	OVERDUE	\$0.50	\$0.00	2/2/07	ROSEDAL	1 CASH	4/24/08
12	Classic rat	25000005537718	OVERDUE	\$0.50	\$0.00	2/2/07	ROSEDAL	1 CASH	4/24/08
13	The terrori	25000006059506	OVERDUE	\$0.50	\$0.00	4/27/07	ROSEDAL	1 CASH	4/24/08
14	Human boi	25000006149117	OVERDUE	\$0.50	\$0.00	4/27/07	ROSEDAL	1 CASH	4/24/08
15	Guinness	25000006390414	OVERDUE	\$0.25	\$0.00	5/11/07	ROSEDAL	1 CASH	4/24/08
16	A light in tl	25000001603258	OVERDUE	\$0.25	\$0.00	5/11/07	ROSEDAL	1 CASH	4/24/08
17	Draw 50 bi	25000005721650	LOST	\$13.99	\$0.00	11/19/07	ROSEDAL	1 CANCEL	4/24/08
18	Draw 50 bi	25000005721650	PROCESS	\$5.00	\$0.00	11/19/07	ROSEDAL	1 CANCEL	4/24/08
19	Draw 50 bi	25000005721650	OVERDUE	\$3.00	\$0.00	4/24/08	ROSEDAL	1 CASH	4/24/08
20	Scary stor	25000007575070	LOST	\$10.86	\$0.00	10/27/08	ROSEDAL	1 CANCEL	1/14/10
21	Scary stor	25000007575070	PROCESS	\$5.00	\$0.00	10/27/08	ROSEDAL	1 CANCEL	1/14/10
22	Scary stor	25000007575070	OVERDUE	\$3.00	\$3.00	1/14/10	ROSEDALE		

## View Bills History

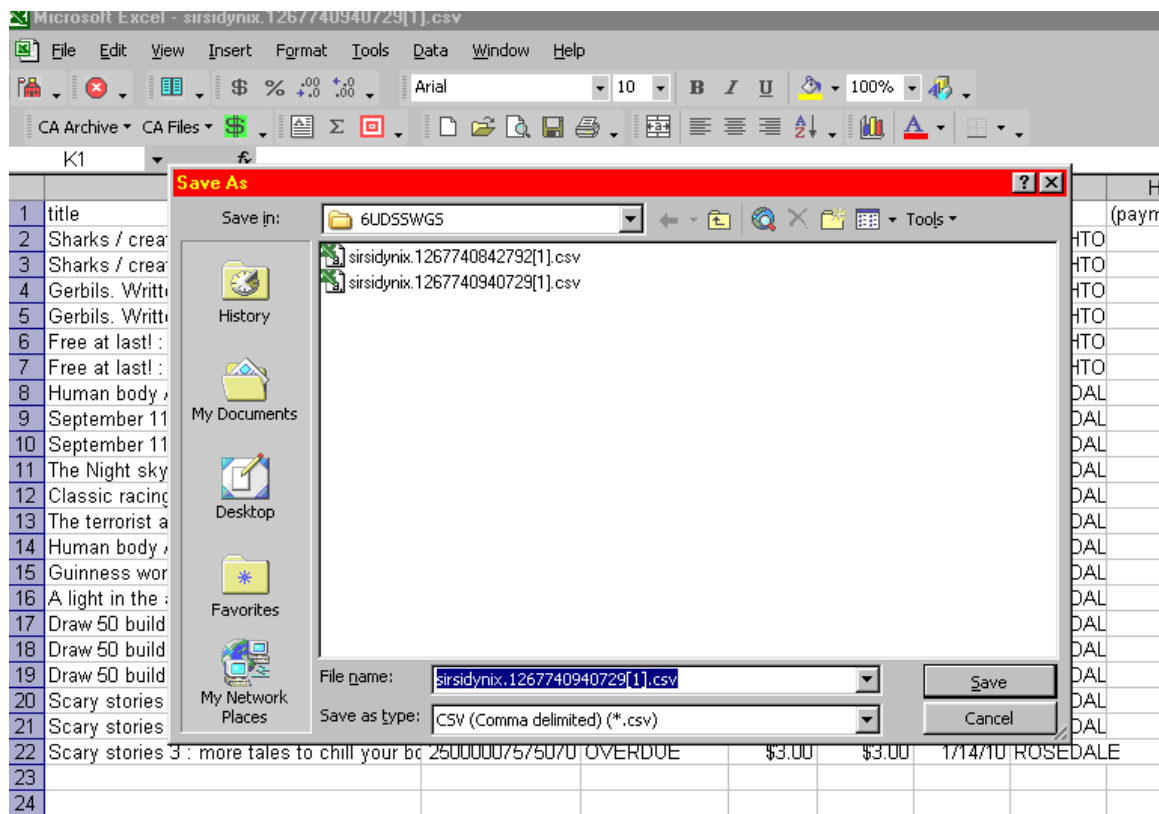
5. Column widths can be adjusted by clicking and dragging after positioning the cursor between two column headings



	A	B	C	D	E	F	G	H	I	J	K
1	title	itemid	reason	amountbil	balance	date	library	(payment	rtype	date	
2	Sharks / created and written by John Bonn	25000005416640	LOST	\$14.43	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
3	Sharks / created and written by John Bonn	25000005416640	PROCESSFEE	\$5.00	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
4	Gerbils. Written and illustrated by Arnold D	25000002174853	LOST	\$3.75	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
5	Gerbils. Written and illustrated by Arnold D	25000002174853	PROCESSFEE	\$5.00	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
6	Free at last! : the story of Martin Luther Kir	25000005750535	LOST	\$7.55	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
7	Free at last! : the story of Martin Luther Kir	25000005750535	PROCESSFEE	\$5.00	\$0.00	12/6/04	FRUSHTO	1	CANCEL	12/14/04	
8	Human body / written by Steve Parker.	25000006149117	OVERDUE	\$0.50	\$0.00	11/10/06	ROSEDAL	1	CANCEL	11/28/06	
9	September 11 : attack on America / by An	25000003309789	OVERDUE	\$0.50	\$0.00	11/10/06	ROSEDAL	1	CASH	11/28/06	
10	September 11 : attack on America / by An	25000003309789	OVERDUE	\$0.05	\$0.00	11/28/06	ROSEDAL	1	CASH	11/28/06	
11	The Night sky / Robin Kerrod ; illustrated b	25000000179789	OVERDUE	\$0.50	\$0.00	2/2/07	ROSEDAL	1	CASH	4/24/08	
12	Classic racing cars : Grand Prix and Indy /	250000005537718	OVERDUE	\$0.50	\$0.00	2/2/07	ROSEDAL	1	CASH	4/24/08	
13	The terrorist attacks of September, 11, 200	250000006059506	OVERDUE	\$0.50	\$0.00	4/27/07	ROSEDAL	1	CASH	4/24/08	
14	Human body / written by Steve Parker.	25000006149117	OVERDUE	\$0.50	\$0.00	4/27/07	ROSEDAL	1	CASH	4/24/08	
15	Guinness world records.	25000006390414	OVERDUE	\$0.25	\$0.00	5/11/07	ROSEDAL	1	CASH	4/24/08	
16	A light in the attic / Shel Silverstein.	25000001603258	OVERDUE	\$0.25	\$0.00	5/11/07	ROSEDAL	1	CASH	4/24/08	
17	Draw 50 buildings and other structures / Le	25000005721650	LOST	\$13.99	\$0.00	11/19/07	ROSEDAL	1	CANCEL	4/24/08	
18	Draw 50 buildings and other structures / Le	25000005721650	PROCESSFEE	\$5.00	\$0.00	11/19/07	ROSEDAL	1	CANCEL	4/24/08	
19	Draw 50 buildings and other structures / Le	25000005721650	OVERDUE	\$3.00	\$0.00	4/24/08	ROSEDAL	1	CASH	4/24/08	
20	Scary stories 3 : more tales to chill your bc	25000007575070	LOST	\$10.86	\$0.00	10/27/08	ROSEDAL	1	CANCEL	1/14/10	
21	Scary stories 3 : more tales to chill your bc	25000007575070	PROCESSFEE	\$5.00	\$0.00	10/27/08	ROSEDAL	1	CANCEL	1/14/10	
22	Scary stories 3 : more tales to chill your bc	25000007575070	OVERDUE	\$3.00	\$3.00	1/14/10	ROSEDALE				

## Format the Report

1. Select Save As from the File menu. These are the default options displayed by Excel.



## View Bills History

2. Select a location in the Save In box. Name the file in the File Name box. Change the Save as Type box to Microsoft Excel Workbook (.xls). Click the Save button to save.

